



## Bruce A. Fowler

### Managing Director

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Bruce has more than 20 years of experience counseling families and owners of closely held businesses regarding all aspects of their estate, tax, and legacy plans. A former CPA with Deloitte & Touche, Bruce excels at helping his clients create comprehensive wealth and tax strategies tailored for their particular needs. He regularly works with multiple generations of families to create a seamless plan that maximizes the specific long-term goals of each generation. In addition to his practice, Bruce serves as Managing Director of the firm.

In counseling high-net and ultra-high-net-worth clients, Bruce focuses on efficiently preserving and transferring family assets, including family-owned businesses, in a tax efficient manner. In all cases, Bruce works with families to identify their specific goals and then structures their estates in a manner that minimizes conflicts and decreases tax exposure. Bruce also frequently collaborates and connects his clients with a network of other professionals including financial and insurance advisors, business advisors, accountants, and family counselors, who work together to address the unique needs of each family.

In many families, Bruce identifies and implements programs to help families meet their philanthropic goals, and he represents several large family foundations in this regard. He also provides advice to beneficiaries and trustees regarding their rights and responsibilities and handles probate and trust litigation. Clients rely on Bruce's pragmatic approach to navigating complex, often emotional, disputes, and his depth of experience with complex litigation, including tax disputes, allows him to remain committed to finding a solution that works for his clients.

Bruce's tax representation includes handling tax audits and the successful negotiation of many favorable settlements of tax assessments. In cases where a settlement was not feasible, Bruce has represented clients in the protest and litigation of tax assessments.

#### Education

The University of Tulsa College of Law, J.D., *with honors*, 1996

University of Tulsa, M.S., Taxation, 1992

Oral Roberts University, B.S., *summa cum laude*, 1988

## Bar Admissions

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Colorado

Ohio

Oklahoma

## Practice Areas

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Corporate

Entrepreneurs and Closely Held Businesses

Litigation

State and Local Tax Litigation

Tax

Wealth Planning, Trusts, and Estates

Estate and Gift Planning

Probate and Trust Administration

Estate and Trust Litigation

Family Business Succession Planning

Philanthropy, Private Foundations, and Charitable Organizations

## Sectors

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Automobile Dealerships

## Representative Experience

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- Represented a \$70 million private foundation in structuring the organization and obtaining tax-exempt status; represents the foundation on tax-related matters and structuring grant agreements with grantee organizations
- Counsel to trustees of several multi-million dollar trusts involving complex family and closely-held business issues
- Counsel to several families of family-owned businesses on estate tax and succession plan issues
- Successfully represented the heir of a decedent with an intentional interference with right of inheritance claim against the heir's sibling who convinced their father to disinherit the heir
- Successfully represented several automobile dealers against a \$2.5 million sales tax assessment, resulting in a complete victory for the dealers
- Assisted the founder of a successful business to design a tax-efficient and equitable plan to transfer ownership to the founder's son, while allowing other assets to be distributed to his other children not involved in the business.

## Professional Affiliations

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- American Bar Association

- American Institute of Certified Public Accountants (CPA–Oklahoma, 1990)
- Colorado Bar Association

## Community Involvement

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- Denver Metro Chamber of Commerce
  - Leadership Denver, 2009
- Friends of the Chain Foundation
  - Board of Directors, chair, 2007 - present
  - Supports an orphanage for blind children in Uganda
- Kempe Foundation
  - Past Board of Directors, Secretary
- PlatteForum
  - Board of Directors, Emeritus
  - Board of Directors, chair, 2004 – 2007
  - Arts education organization, won the Mayor’s Award for Excellence in 2007
- Riverfront Park Community Foundation, 2002 - present

## Recognition

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- The Best Lawyers in America
  - Litigation - Trusts and Estates
  - Tax Law
  - Trust and Estates
- The Denver Foundation
  - 2012 Philanthropic Leadership Award

## Presentations

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- “The Kids are (Gonna be) All Right,” Colorado Automobile Dealers Association (October 14, 2014)
- “Estate Planning Considerations for Each Generation of Family Business Ownership,” Family Business Council (June 21, 2012)